



**STATE OF MONTANA
MONTANA DEPARTMENT OF TRANSPORTATION
JOB PROFILE**



Update



Formal Review

Date Submitted _3/1/2013_

SECTION I - Identification

Working Title: Entry-Level Budget Analyst

Department: Transportation

Job Code Number: 132316

Division & Bureau:
Administration Division
Budget & Planning Bureau

Job Code Title: Budget Analyst

Section & Unit: Budget Section

Pay Band: 6

Work Address: 2701 Prospect Ave

Position Number: 20006, 20026, 20027, 21057

Phone: 406.444.7665



FLSA Exempt



FLSA Non-Exempt



Non-Union



MPEA



Blue Collar

Profile Completed By:

Roche Juneau
John Huth

Work Phone:

406.444.7665
406.444.0884

Work Unit Mission Statement or Functional Description:

The Administration Division provides support services for the entire department in accounting, financial management, purchasing and mail services, federal grant management, and fuel administration and tax collection.

Describe the Job's Overall Purpose:

This position is an entry-level budget analyst for the Montana Department of Transportation (MDT). Duties include conducting financial and program analyses for multiple programs within the Department; financial reporting; conducting research and providing professional fiscal assistance to other fiscal officers and accounting staff; and monitoring budgets for all assigned programs. The position reports to the Budget Section Supervisor, and does not directly supervise other agency personnel.

SECTION II - Major Duties or Responsibilities

This section should be a clear concise statement of the position's major duties and the approximate percent of work time for each duty

% of Time

A. PROGRAM FINANCIAL ANALYSIS AND REPORTING

40%

1. Analyze various monthly, quarterly, and annual financial reports and analyses for the department and individual programs. This involves researching, and analyzing financial data from various sources (e.g., system-generated reports, program files, etc.) to identify and evaluate pertinent data in accordance with reporting requirements, and to identify any errors or anomalies; evaluating and tracking data to determine status of various programs; monitoring changes in reporting requirements; and generating reports for each program in accordance with all applicable requirements. The incumbent must have knowledge of varying reporting requirements for each program, and must monitor and identify changes in reporting requirements and adapt or develop formats as appropriate.
2. Analyze and evaluate data to determine program trends, recommend program modifications, and oversee the changes made in program funding availability and requirements. Prepare necessary financial reports and develop appropriate measures to ensure program and fiscal information complies with overall department fiscal objectives.
3. Develop and recommend funding allocations with program managers and department managers. Evaluate the effectiveness of assigned programs in coordination with individual program managers and department managers to identify problems and deficiencies, and develop and recommend solutions.
4. Prepare annual operational plans for each assigned MDT program based on legislative intent and submit to supervisor. Allocate the department's funds by organizational unit and second level object of expenditure via SABHRS standard budget processes to provide responsible personnel with an initial operating plan and supporting funding within the SABHRS org units they manage.
5. Establish operating budget each fiscal year for assigned programs. This involves working with OBPP to complete an analysis of budgetary needs for the MBARS turn-around document process, communicating attribute needs are to OBPP, and ensuring the assigned programs are in alignment with approved operational plan. This involves working closely with the supervisor to decipher specific budgetary information during and after the legislative session such as: funds, sub-classes, budget establishment orgs. Turn-around documents are completed in accordance with legislative intent obtained from analysis of the department's budget submission, the Governor's Executive Budget proposal submitted to the legislature for consideration, the Legislative Fiscal Analyst's analysis of the Governor's Budget, testimony and minutes recorded during the legislative session, and the Legislative Fiscal Analyst's Appropriation Report is published after the legislative session.
6. Conduct financial analysis of assigned programs and develop reports regarding the department's budget status and performance accomplishments to ensure management is informed of service level accomplishments in relation to expenditures incurred. Make expenditure projections based upon historical trends, current program operations, and

knowledge of current economic and environmental issues. Reports would be reviewed by the supervisor before distributing. Inform supervisor about current or possible noncompliance issues concerning applicable state and federal rules governing agency financial operations and possible changes needed to the existing budget. Inform management about current or estimated noncompliance issues concerning applicable state and federal statutes governing agency financial operations.

7. Meet with program managers to discuss budget status, operational plan change needs, and performance standard accomplishments, and to gather information concerning program operations and economic and environmental issues for assigned programs. Recommend solutions and directions to supervisor and program managers that will require adjustments. Reasons for adjustments to current level budget include changes in accounting procedures, adjustments to program goals and objectives, legal requirements, economic and environmental issues or assumptions, performance standard adjustments, unexpected or unusual occurrences such as natural disasters, or changes in organizational structure.
8. Identify and investigate anomalies and complex or unusual errors in fiscal and budget data. This involves verifying calculations; researching program data, reports, any additional fiscal data, and applicable laws and regulations; and coordinating with fiscal officers and program managers to resolve problems or errors.

B. FISCAL POLICY AND SYSTEM DEVELOPMENT

15%

1. Ensure compliance with applicable laws and regulations as they arise to ensure efficient operations. Recommends necessary policy changes to provide accurate and meaningful management information and ensure legal compliance. This involves research of budgeting and accounting issues at the state and federal levels (e.g., funding limitations, spending authorities, etc.); assessment of automated fiscal systems; consultation with other bureaus, federal agencies, and industry organizations; and assessment of budget, accounting, and reporting requirements. The supervisor will provide direction to ensure research produces the desired end product.
2. Review and provide oversight to the ongoing operation of budget, accounting, and position (FTE) management systems and procedures to ensure accuracy, efficiency, and compliance with applicable state, federal, and departmental regulations and requirements. This involves periodic review and reconciliation of Statewide Accounting Budgeting and Human Resource System (SABHRS) activity and other systems utilizing established budgeting formats and procedures.
3. Work with the Administrator and Bureau Chiefs regarding potential fiscal, programmatic, or policy problem areas and recommend alternative solutions within the guidelines of legislative and budgetary intent. Review these with the supervisor prior to finalizing.
4. Maintain and recommend enhancements to the computerized departmental fiscal management and budget development systems by ensuring the integrity of the data and following established quality assurance methods that are used to verify data and ensure the information is useful to MDT and federal officials. This involves identifying system deficiencies and forwarding recommendations to supervisor. The systems or exported data from the systems should be easily reformatted to meet program fiscal management

requirements, and allow flexibility to define the budget submission in any organizational structure determined necessary at the time. The position participates in defining information needs, assessing interfaces with related systems, and performing system testing and implementation to ensure transactions are processed properly.

5. Distribute internal budget instructions to facilitate a department budget submission in accordance with the Office of Budget and Programming Planning (OBPP) and Legislative Fiscal Division (LFD) requirements. Participates in implementation of budget policies, methods, and procedures by researching and analyzing the impacts and effects of changes, and implementing approved recommendations. Participates in training of MDT staff on system usage and methods to reach desired outcomes.
6. Review budgeting and other related systems for correctness and accuracy in the processing of transactions and in the compilation of information for system users. Maintain established controls to ensure the timeliness, accuracy, and regulatory compliance of budgeting and related fiscal activities by researching and analyzing problems and needs, then identify and recommend solutions.
7. Maintain program funding models and develop these during the next budget cycle. This involves in-depth trend analysis of program operations and activities, funding sources, and expenditures to determine the proper model to apply to the program. Participate in the design and test of budget modeling systems to ensure accuracy of projections and compliance with program needs. Supervisor will provide training on governmental fund structure and department accounting structure so incumbent gains an understanding of funding models.
8. Maintain the Personal Services Budget Management System (PSBM) used to provide current personal services information and program analysis data such as “what-if” analysis of proposed union, program, and organizational changes. This involves assessing agency-wide reporting needs, determining system capabilities, and developing recommendations for system enhancement and modification to meet agency fiscal needs.
9. Compile, analyze, and report FTE utilization, and make recommendations to supervisor on current and projected FTE utilization in relation to current and expected program accomplishments to ensure the department’s goals and objectives are met with minimum usage of available personal services budget authority and available manpower hours.

C. BUDGET DEVELOPMENT AND MONITORING

30%

1. Participate with program managers and other budget staff in the development of measurable performance standards and ensure the budget submission is based on performance criteria.
2. Organize and coordinate the Executive Planning Process (EPP) for assigned department programs. Work with supervisor and budget team to analyze, justify, and negotiate with OBPP for financial inclusion of individual EPP requests in the department’s budget submission. Analyze the financial effects and ensure all approved EPP items are included in the department’s budget submission.

3. Clarify and work with program managers to refine the budget submission. Work with supervisor and assigned programs to formalize written descriptions of goals and objectives, performance measures, and decision packages so they are in accordance with the Executive Budget Instructions.
4. Compile and Analyze budget goals, objectives, and performance measures to ensure they are based on the department's mission statement and strategic plan; comply with state and federal laws, legislative and public expectations; and are reasonable compared to historical expenditure patterns, past performance, and planned service levels. Identify and ensure proper justification of all differences between base year expenditures and the budget submission. Clarify with program managers to refine the budget submission.
5. As part of the budget team and together with the supervisor, justify the department's budget submission to the OBPP and the LFA regarding to ensure the consequences of proposed adjustments are considered in terms of service levels, effects on the public, and compliance with federal regulations.
6. Maintain constant communication with program managers to ensure budget submission is adjusted for any major items overlooked originally, or for issues that were not in existence at the time of submission
7. Review and analyze LFA's analysis of the executive budget for assigned programs. Together with the program managers of assigned programs, negotiate and prepare proper responses to that analysis. Provide coordination and direction in preparation of defending the budget during the legislative session.
8. As part of the budget team, monitor legislative actions affecting the department's budget submission. Inform program managers of the current status of their request during the legislative session. Analyze the fiscal impact and service level adjustments with regard to proposed and actual legislative actions.
9. Update the MDT Budget Development System in accordance with the final approved legislative budget and management system allocations for assigned programs during development, during legislative hearings, and to reflect the final approved legislative budget. Uses the final BDS detail to load standard budgets in working org units.
10. Allocate and monitor personal services budget authority as approved by the legislature at the program, org unit, and position levels to ensure program managers receive the proper amount of authority at the beginning of each fiscal year in order to plan their activities and alternatives to meet goals and objectives. Legislative issues such as vacancy savings and unfunded pay plans must be allocated, and changes in organizational structure and reclassifications must be accounted for.
11. Maintain personal services budget authority, full time equivalent (FTE) and position allocation in SABHRS, and MDT's Personal Service Budget Monitoring (PSBM), and Personal Service Administration (PSA) systems.

D. RESEARCH AND TECHNICAL ASSISTANCE

10%

1. Research, analyze, and provide fiscal policy interpretation to program managers and other fiscal officers on legislative intent, implementation of biennium budget, and needs for additional budget authority.
2. Research, accumulate data, and provide information in response to requests from management, the public, other state transportation departments or agencies, the federal government, legislative inquiries, departmental personnel, or legal requests. Provide budgetary information, historical revenue and expenditure information, and resource utilization information, particularly on personal services, and goals, objectives, and performance measurement information. Research, accumulate data, and provide information in response to requests from management, the public, other state transportation departments or agencies, the federal government, legislative inquiries, departmental personnel, or legal requests as assigned. Final information is reviewed by supervisor before leaving the section.
3. Research federal and state statutes and appropriations legislation to develop informed assumptions about future resource availability. This activity requires in-depth knowledge of the funding sources and programs of the department, and the annual federal and biennial state budget cycles. Works with program managers and supervisor to research federal and state statutes and appropriations legislation to develop informed assumptions about future resource availability.
4. Participate in the preparation of training materials, and budget development assistance to department personnel. Technical assistance will cover state and federal laws current budget submission requirements of OBPP, department budget processes and policies, BDS, PSBM, SABHRS, and how to use reports produced by these systems. Typical training covers current submission requirements of OBPP, state and department budget processes and policies, the department's internal budget development system, the operation of and information contained in the projected FTE utilization system, information contained in the Position Control Report, and the allocation of personal services budget authority; and considers current or proposed MDT organizational structure.
5. During the legislative session, review department proposed legislation and bills affecting assigned MDT programs, participate in development and review of fiscal notes, recommend and develop amendment language for legislative bills as requested. Under guidance from the section supervisor or senior analysts, reviews bills during the legislative session affecting assigned MDT programs, participates in development and review of fiscal notes, recommends and develops amendment language for legislative bills as requested.

E. OTHER DUTIES AS ASSIGNED

5%

1. Perform a variety of other duties in support of the Division as assigned by the supervisor, Bureau Chief, or Division Administrator. These duties include research, analysis, and reporting of MDT fiscal issues; representing the Bureau on special projects, financial teams, and committees; and attending education and training courses.
2. Complete assignments within established timeframes and keep supervisor and other

stakeholders informed of progress towards outcomes. Ensure supervisor and stakeholders are informed in a timely manner if deadline or circumstances changes.

3. Organize and participate in training and budget presentation when assigned and ensure materials, presentation, and visual aids are appropriate for intended audiences.

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1. ***The following duties and/or specific tasks listed under section II above are considered “essential functions” because they require specialized expertise and skill and are the primary reasons the job exists (they must be performed by this position with or without accommodations):***

A, B, C & D

The following mental and physical demands are associated with these essential functions:

PHYSICAL

- Lifting and carrying light items (papers, books, reports).
- Remaining seated for extended periods of time, with occasional walking; standing; bending

MENTAL

- Operating a personal computer.
- Professional level communication skills in writing, in person and over the phone.
- Ability to multi-task.
- Demands for accuracy in all aspects of work.
- Ability to meet inflexible deadlines.
- Complex mathematics.
- Comparing data.
- Compiling information, analyzing, coordinating, synthesizing, negotiating, instructing.
- Maintaining a positive attitude and professional demeanor.
- Ability to make prudent financial decisions.

2. Does this position supervise others? ☐ Yes ☒ No

Number directly supervised: n/a

Position Number(s) of those supervised: n/a

3. Attach an Organizational Chart.

SECTION III - Minimum Qualifications - List minimum requirements for the first day of work.

Critical knowledge and skills required for this position:

KNOWLEDGE:

The position requires knowledge of the concepts and theories of government finance, accounting, budgeting, economics, and statistics. The work requires knowledge of state and federal accounting and budgeting requirements; MDT organizational structure, operating procedures, mission statement, strategic plan, and program operations; state and federal regulatory laws; government and investment accounting and auditing; generally accepted accounting principles (GAAP); Governmental Accounting, Auditing, and Financial Reporting requirements; Government Accounting Services Board (GASB); the state accounting system (SABHRS) and other internal systems; federal grant procedures; contract management; past and anticipated program service levels and current economic and environmental trends and issues; time and labor analysis, personnel policies, collective bargaining agreements, and state pay plans; adult education and training methods; automated budgeting and fiscal system development and implementation; and the department's funding and accounting structure. The position requires knowledge of the legislative process; federal funds management; and negotiation methods and techniques.

SKILLS:

The position requires skill in the operation of a personal computer, related software, and standard office equipment; problem solving techniques; system analysis and design procedures; written and verbal communications; and negotiation. The position also requires skill in developing systems and policies and interpreting laws and regulations. Skill in conducting research. Skill in management of resources through various automated systems, negotiation and mediation, work planning, delegation, and data collection and analysis, and fiscal projection. Skill in Word and Excel spreadsheet applications, and the state accounting system and multiple internal financial management and budgeting systems.

Behaviors required to perform these duties:

See MDT Core Behaviors

Education:

Check the one box indicating minimum education requirements for this position for a new employee the first day of work:

- | | |
|---|--|
| <input type="checkbox"/> No education required | <input type="checkbox"/> Related AAS/2-years college/vocational training |
| <input type="checkbox"/> High school diploma or equivalent | <input checked="" type="checkbox"/> Related Bachelor's Degree |
| <input type="checkbox"/> 1-year related college/voc. training | <input type="checkbox"/> Related Master's degree |

Please specify the acceptable fields of study:

Business Administration, Accounting, Finance or other related field

Other education, training, certification, or licensing required (specify):

Experience:

Check the one box indicating minimum work-related experience requirements for this position for a new employee the first day of work:

- | | |
|---|--|
| <input type="checkbox"/> No prior experience required | <input type="checkbox"/> 3 years |
| <input type="checkbox"/> 1 year | <input type="checkbox"/> 4 years |
| <input checked="" type="checkbox"/> 2 years | <input type="checkbox"/> 5 or more years |

Other specific experience (optional):

2 years of experience in related field

Alternative Qualifications:

This agency may accept alternative methods of obtaining necessary qualifications.

☒ Yes ☐ No

Alternative qualifications include:

Other equivalent combinations of education and experience may be considered on a case-by-case basis.

SECTION IV – Other Important Job Information

- | | |
|--|---|
| <input type="checkbox"/> Fingerprint check | <input type="checkbox"/> Valid driver's license |
| <input checked="" type="checkbox"/> Background check | <input type="checkbox"/> Other; Describe |

Other information including working conditions such as shifts, lifting requirements, travel or hours.

SECTION V – Signatures

Signature indicates this statement is accurate and complete.

Employee:

Name: _____ Title: _____

Signature: _____ Date: _____

Immediate Supervisor:

Name: _____ Title: _____

Signature: _____ Date: _____

Bureau Chief:

Name: _____ Title: _____

Signature: _____ Date: _____

Division/District Administrator:

Name: _____ Title: _____

Signature: _____ Date: _____

Department Designee:

Brent Rabe/Designee

Human Resources Administrator
Human Resources Division

Signature: _____ Date: _____